

RE-2 Employee Post Travel Disclosure of Travel Expenses

Date/Time Stamp

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**

Certification: In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:

Private Sponsor(s):
Progressive Policy Institute

Travel Dates:
06/01/2023 to 06/03/2023

Name of accompanying family member (if any):

Relationship to Traveler:

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$320.00	\$480.00	\$130.00	\$0.00

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final Employee Pre-Travel Authorization (Form RE-1)
- The final Private Sponsor Travel Certification Form with all attachments
- The final invitation
- The final approved itinerary

Finally, I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

06/08/23
Date

Robert Ordway
Printed Name of Traveler


Signature of Traveler

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

6-8-23
Date


Signature of Supervising Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☐ Yes ☒ No

Expense Change

Revised Amount

Explanation

There were no changes to pre-approved travel expenses.

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation: There were no changes to the pre-approved itinerary.

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation: There were no additional changes to the pre-approved trip.

RE-1 Employee Pre-Travel Authorization

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved.

Date/Time Stamp

Name of Traveler:

Robert Ordway

Employing Office/Committee:

Office of Senator Mike Braun (IN)

Private Sponsor(s):

Progressive Policy Institute (PPI)

Destination(s):

New York, NY

Travel Dates:

June 1, 2023 - June 3, 2023

NOTE: If you plan to extend the trip for any reason you must notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties.

As a Senior Policy Advisor, Robert's duties include supporting Senator Braun's work on the Senate Budget Committee. The retreat will help Robert be a more effective staffer by providing him with a deeper understanding of budget matters currently impacting the United States by learning from scholars that are experts in the field.

Do you have an accompanying family member or spouse on this trip?

Name and Relationship to Traveler:

☐

(signify "yes" by checking box)

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

May 2, 2023

Date



Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Senator Mike Braun

Robert Ordway

(Print Senator's/Officer's Name)

hereby authorize

(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☐

(signify "yes" by checking box)



May 2, 2023

Date

Signature of Supervising Senator/Officer

Progressive Policy Institute: PPI Staff Del to New York, NY

 Robert Ordway

Title:
Senior Policy Advisor

Employing Office/Committee:
BRAUN, MIKE

Duty Station:
WASHINGTON, DC

Destination(s):
New York, New York

Explain how this trip is specifically connected to the traveler's official or representational duties:

As a Senior Policy Advisor, Robert's duties include supporting Senator Braun's work as a member of the Senate Budget Committee. The fellowship will help Robert be a more effective staffer by providing him with history lessons and a deeper understanding of budget matters currently impacting the United States as presented by scholars that are experts in the field.

Name of accompanying family member (if any):
Not Entered

Name and Relationship to Traveler:
None

Organization Information

Organization Name
Progressive Policy Institute

Is your organization classified as a §501(c)(3)?

☒ Yes ☐ No

§501(c)(3) Organization Type
Private Foundation

Address
1156 15th St NW

Address 2 (Optional)
Private Foundation

City, State Zip
Washington, District Of Columbia 20005 United States

Phone Number
8605088554

Organization URL

History of Congressional Travel

The Progressive Policy Institute (PPI) has sponsored several Congressional staff and member delegations since its founding in 1989. These educational trips have focused on a wide variety of policy areas and they aim to explore how the issues moving on Capitol Hill have an impact on the real world. PPI last sponsored Senate travel in March 2023.

Educational Activities

As of non-profit 501 (c) (3) think-tank, the nature of PPI's work is educational. We release dozens of reports, research, and other policy analysis work annually. PPI also hosts public forums, Congressional staff and member briefings, webinars, roundtables, and other events around issue education.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

- ☒ I certify that the sponsor is not a foreign government.
- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

Comments
None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

This is a bipartisan, bicameral congressional staff delegation trip to New York, NY to meet with financial experts with experience in government, media, private industry, and academic. The meetings on this trip will relate directly to key policy priorities of PPI and the attending congressional staff. The trip will focus on exploring three key themes (1) the federal debt limit (2) inflation, interest rates, & long-term debt trajectory (3) the impact of fiscal and monetary on bank stability.

Explain how the purpose of the trip relates to your organization's mission.

The Third Way Foundation has been conducting policy work and facilitating educational dialogues on fiscal and monetary issues since in 1989. The bipartisan nature of the trip also reflects PPI's commitment to the development of pragmatic policy that can help break through partisan gridlock.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized specifically with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations

- ☒ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Complete if any of the sponsors is not a §501(c)(3) organizations.

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip
- ☐ The trip is limited to a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip

Certification of No Recreational Activity and No Alcohol

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees

i Members and staff from the House of Representatives will receive invitations.

The list of invitees is below.

Travel Details

Trip Start Date/Time:
06/01/2023 @ 01:10 PM



Trip End Date/Time:
06/03/2023 @ 11:05 AM

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: \$320.00 | Accompanying Family Member: \$0.00)

Transportation Type	Class	Amount
Ground Transportation	N/A	\$20.00
Note Subway		
Ground Transportation	N/A	\$20.00
Note Ride share and taxi.		
Train	Coach	\$280.00
Note Round trip from WAS-NYP.		

Lodging (Per Member/Officer/Employee: \$480.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
06/01/2023	06/03/2023	Kimberly Hotel	New York	New York	United States	2	\$240.00	No

Meals (Per Member/Officer/Employee: \$130.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
06/01/2023	\$0.00	\$0.00	\$35.00	\$0.00	\$35.00	New York	New York	United States	No
06/02/2023	\$15.00	\$20.00	\$35.00	\$5.00	\$75.00	New York	New York	United States	No

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
06/03/2023	\$15.00	\$0.00	\$0.00	\$5.00	\$20.00	New York	New York	United States	No

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: \$0.00)

Expense Type	Amount	Notes
There are no miscellaneous expenses.		

Additional Attachments All additional attachments are below.

Document Name
5.19.23 Amended Schedule_ PPI StaffDel to New York, NY

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: PPI StaffDel to New York, NY

Travel Date(s): June 1, 2023 - June 3, 2023

Travel Destination(s): New York, NY

Sponsor: The Third Way Foundation (Progressive Policy Institute is a |

Lindsay Lewis

(printed name of sponsor representative)

Executive Director

(title)



(signature of sponsor representative)

5/1/23

(date)

U.S. Senate Staff Invitees
PPI StaffDel to New York, NY – June 1-3, 2023

Chris Sharer
Legislative Assistant
Sen. Joe Manchin
chris_sharer@manchin.senate.gov

Robert Ordway
Senior Policy Adviser
Sen. Mike Braun
robert_ordway@braun.senate.gov

Jesse Mahan
Tax Policy Adviser
Sen. James Lankford
jesse_mahan@lankford.senate.gov



1156 15th Street NW, Ste 400
Washington, DC 20005
Tel: 202-525-3926
Fax: 202-525-3941
info@ppionline.org

April 28, 2023

Robert Ordway
Office of Sen. Mike Braun
404 Russell Senate Office Building
Washington, DC 20515

Dear Robert,

On behalf of the Progressive Policy Institute (PPI), I'd like to invite you to join senior leadership and the fiscal policy team at PPI for a congressional staff delegation trip to New York, NY. The trip is scheduled to depart on the afternoon of Thursday, June 1, and return on the morning of Saturday, June 3.

Over the past two decades, PPI has organized bipartisan delegations of congressional staff for dozens of educational trips to explore policy issues in the real world to better inform their work on Capitol Hill. The trip will entail a packed schedule of meetings with some of the nation's leading experts with experience in government, media, academia, and finance to discuss three major issues:

- The looming standoff over the federal debt limit
- The impact of inflation, interest rates, and long-term debt growth on our economy
- The influence of fiscal and monetary policy on recent small and midsize bank collapses

You have been invited to join us because of your expertise in economics, finance, and budgetary policy. We know Sen. Braun is playing a leading role in fiscal negotiations and is committed to identifying pragmatic, bipartisan solutions to America's economic challenges. We believe the high-level meetings and candid discussions on this trip will be a tremendous resource as you work with your boss on these critical issues in the months ahead.

PPI is a non-profit 501 (c) (3) organization with a mission of providing educational programming on current policy issues. This trip will comply with all U.S. House and Senate ethics rules.

We hope that you will be able to join us for what promises to be an insightful and valuable trip. **We kindly ask that you RSVP no later than Monday, May 1st, 2023.** Space is limited; please contact Stuart Malec at 202-525-3926 or smalec@ppionline.org if you have questions.

Regards,

A handwritten signature in black ink, appearing to read "Lindsay M. Lewis".

Lindsay M. Lewis
Executive Director

A handwritten signature in black ink, appearing to read "Ben Ritz".

Ben Ritz
Director of PPI's Center for Funding America's Future



PPI Staff Del to New York, NY – June 1-3, 2023

Thursday, June 1, 2023

1:10 - 4:42 pm

Train: 148 Northeast Regional from WAS to NYP

5:00pm

Travel to hotel - subway

6:00 pm

Check in at hotel, drop bags

Location: Kimberly Hotel, 145 E 50th St, New York, NY 10022

7:15pm

Travel to dinner - walk or taxi

7:30 pm - 9:30 pm

Fiscal policy dinner discussion with Catherine Rampell, David Shor, and Columbia University

Location: Columbia Club, 30 W 44th St, New York, NY 10036

Special guests at the dinner will be Catherine Rampell, an opinion journalist and nationally syndicated opinion columnist; David Shor, a data scientist and political consultant; and academics at Columbia University. We will discuss the fiscal challenges facing the United States, the debt limit debate, and how these issues are perceived by and communicated to the general public.

Friday, June 2, 2023

8:30-10:00 am

Breakfast Briefing on National Debt

Location: Kimberly Hotel, Conference Space, 145 E 50th St, New York, NY 10022

Briefing will be provided by a senior economist at Willett Advisors LLC, a NYC-based investment management company. The presentation will cover the national debt and the implications it could have for economic growth.

10:00am

Travel to meeting - subway or taxi

10:30-12:30pm

U.S. Economic Outlook Meeting with Beth Ann Bovino

Location: Apco, Conference Room, 1250 Broadway 31st floor, New York, NY 10010

Beth Ann Bovino is widely renowned economic and market research analyst. The Wall Street Journal recognized Beth Ann as the most accurate forecaster of the U.S. economy in 2013 and the 2nd most



accurate forecaster in 2018. Beth Ann will discuss the U.S. economic outlook and how failing to raise or suspend the federal debt limit would affect it. Light lunch will be served following the meeting.

12:30pm

Travel to meeting - subway or taxi

1:30 - 2:45 PM

Discussion with Risk Assessment Professionals

Location: Moody's, 7 World Trade Center, 250 Greenwich St, New York, NY 10007

Moody's is one of the major three main independent rating agencies in the United States. Staff will receive a briefing from risk assessment professionals on the impact of debt-limit brinkmanship on U.S. borrowing.

2:45pm

Travel to meeting - subway or taxi

3:00 - 5:00 PM

Visit to Federal Reserve Bank of New York

Location: 33 Liberty Street, New York, NY 10045

The mission of the Federal Reserve Bank of New York is to make the U.S. economy stronger and the financial system more stable for all segments of society. Staff will meet with economists at the Fed to discuss the impact of monetary policy on inflation and bank stability, and embark on a guided tour.

5:00pm

Travel to hotel - subway or taxi

6:00 - 8:00 pm

Reception with PPI Leadership and Financial Experts

Location: Kimberly Hotel, 145 E 50th St, New York, NY 10022

Staff will meet with PPI leadership and reconvene with experts from private sector, media and academia met during the day's programming for a reception and pizza dinner to recap the trip and discuss lessons learned.

Saturday, June 3, 2023

11:05 - 2:28 pm

Train: 195 Northeast Regional from NYP to WAS



PPI StaffDel to New York, NY – June 1-3, 2023

Thursday, June 1, 2023

1:10 - 4:42 pm

Train: 148 Northeast Regional from WAS to NYP

5:00pm

Travel to hotel - subway

6:00 pm

Check in at hotel, drop bags

Location: Kimberly Hotel, 145 E 50th St, New York, NY 10022

7:15pm

Travel to dinner - walk or taxi

7:30 pm - 9:30 pm

Fiscal Policy Dinner with Catherine Rampell and David Shorr

Location: Sea Fire Grill, 158 E 48th St Between 3rd and Lexington Avenue, New York, NY 10017

Special guests at the dinner will be Catherine Rampell, an opinion journalist and nationally syndicated opinion columnist and David Shor, a data scientist and political consultant. Discussion will be on the fiscal challenges facing the United States, the debt limit debate, and how these issues are perceived by and communicated to the general public.

Friday, June 2, 2023

8:30-10:00 am

Breakfast Briefing on National Debt

Location: Kimberly Hotel, Conference Space, 145 E 50th St, New York, NY 10022

The presentation will cover the national debt and the implications it could have for economic growth. The briefing will be provided by Dr. Lori Esposito Murray, President of the Committee for Economic Development of The Conference Board.

10:00am

Travel to meeting - subway or taxi

10:15-11:30am

U.S. Economic Outlook Meeting with Beth Ann Bovino

Location: Apco, Conference Room, 1250 Broadway 31st floor, New York, NY 10010

Meeting topic will be on the U.S. economic outlook and how failing to raise or suspend the federal debt limit would affect it. Beth Ann Bovino is the Chief Economist at U.S. Bank and a widely renowned economic and market research analyst. The Wall Street Journal



recognized Beth Ann as the most accurate forecaster of the U.S. economy in 2013 and the 2nd most accurate forecaster in 2018.

11:30am

Travel to meeting - subway or taxi

12:00 - 2:00 PM

Visit to Federal Reserve Bank of New York

Location: 33 Liberty Street, New York, NY 10045

Meeting will be led by Stanley Hardy and Michael Nelson at the New York Fed to discuss the impact of monetary policy on inflation and bank stability, and embark on a guided tour. The mission of the Federal Reserve Bank of New York is to make the U.S. economy stronger and the financial system more stable for all segments of society.

2:00pm

Travel to meeting - walk or taxi

2:30 - 4:30 PM

Discussion with Risk Assessment Professionals

Location: Moody's, 7 World Trade Center, 250 Greenwich St, New York, NY 10007

Staff will receive a briefing from Moody's analysts Anne Van Praagh, Mauro Leos, and Bill Foster on the impact of debt-limit brinkmanship on U.S. borrowing. Moody's is one of the major three main independent rating agencies in the United States.

4:30pm

Travel to hotel - subway or taxi

5:30 - 7:30 pm

Reception with PPI Leadership and Financial Experts

Location: Rooftop at Kimberly Hotel, 145 E 50th St, New York, NY 10022

Staff will participate in a debrief meeting with PPI's Ben Ritz and and then reconvene with private sector, media and academia experts met during the day's programming for a closing reception.

Saturday, June 3, 2023

11:05 - 2:28 pm

Train: 195 Northeast Regional from NYP to WAS